PCORI Online User Manual: Submitting an Application

Broad PFAs

Revised 7/10/2015

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About PCORI Online

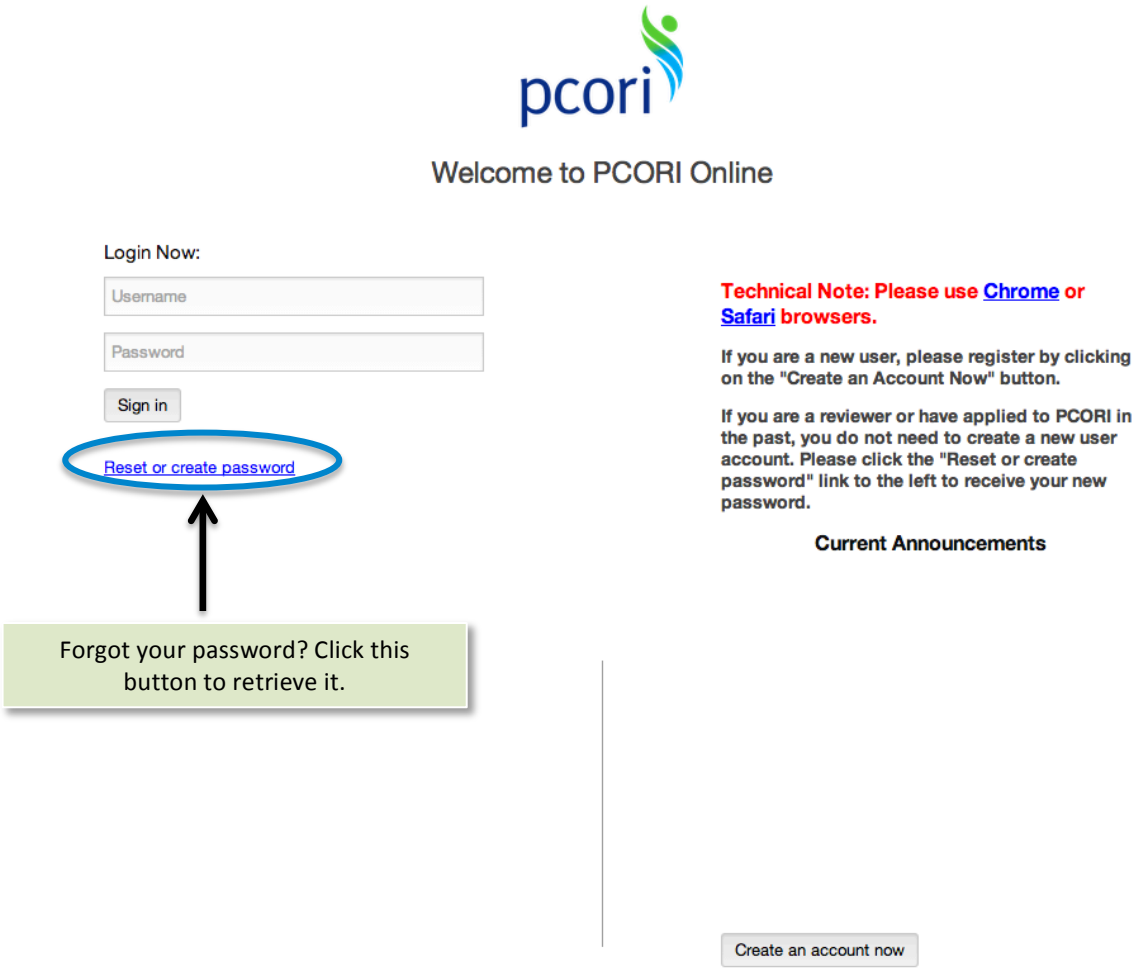
PCORI Online supports PCORI Funding Announcements (PFAs), application submission, and PCORI's review process. Before you begin, please note the following:

- To apply to a PCORI funding announcement you must have an account in the system. If you do not have an account, follow the Create an Account instructions. If you have an account and have forgotten your password click "Reset or create password" to receive your new password via email.
- Enter your username and password in the sign-in boxes.
- PCORI Online is compatible only with Safari and Chrome browsers.
- If you run into technical difficulties using PCORI Online, please contact us at pfa@pcori.org.

Log Into PCORI Online

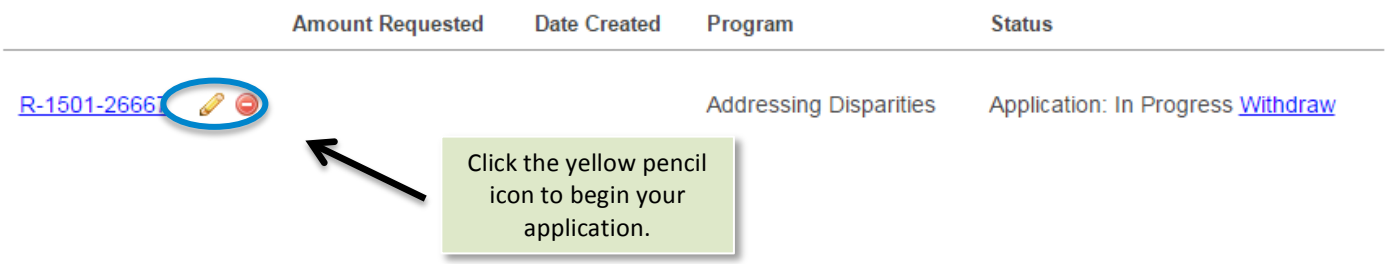
You must use PCORI Online to submit your application. **To complete your application, you must have previously submitted a Letter of Intent (LOI) to PCORI**. (Note that all LOIs must be approved by PCORI prior to the submission of an application. Refer to the PFA for further guidance.)

- To login, go to pcori.fluxx.io
- Enter the username and password you used to submit your LOI
- If you forgot your password, click on "Reset or create password"


Welcome to PCORI Online
Login Now:
Username
Password
Sign in
Reset or create password
Forgot your password? Click this button to retrieve it.
Technical Note: Please use Chrome or Safari browsers.
If you are a new user, please register by clicking on the "Create an Account Now" button.
If you are a reviewer or have applied to PCORI in the past, you do not need to create a new user account. Please click the "Reset or create password" link to the left to receive your new password.
Current Announcements
Create an account now

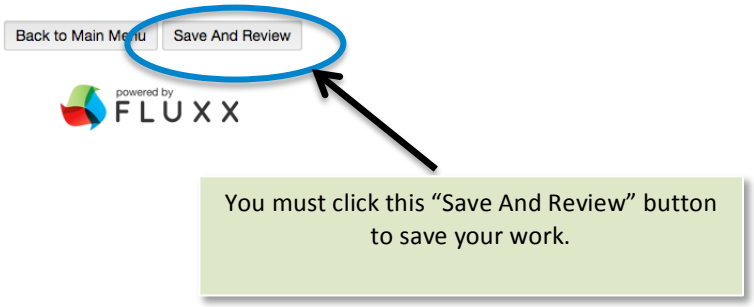
Locate Your Application

To begin your application, click the yellow pencil icon next to the request number. The application includes previous contact and project information from the LOI and requires additional information.

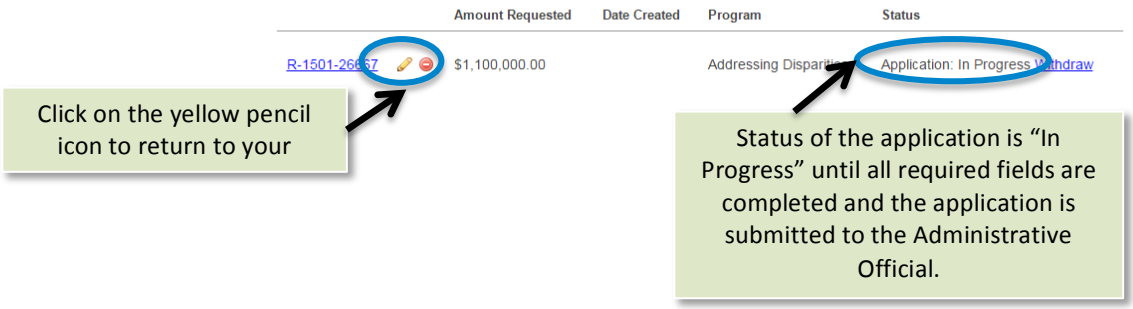


Save Your Application

While working on your application, you can save your work at any time. To save your work, go to the bottom of the application and select the Save And Review button. **Please be sure to do this before closing the browser or your work will be lost.** After saving your work, you may click on the "Back to Main Menu" button to leave the current application session.



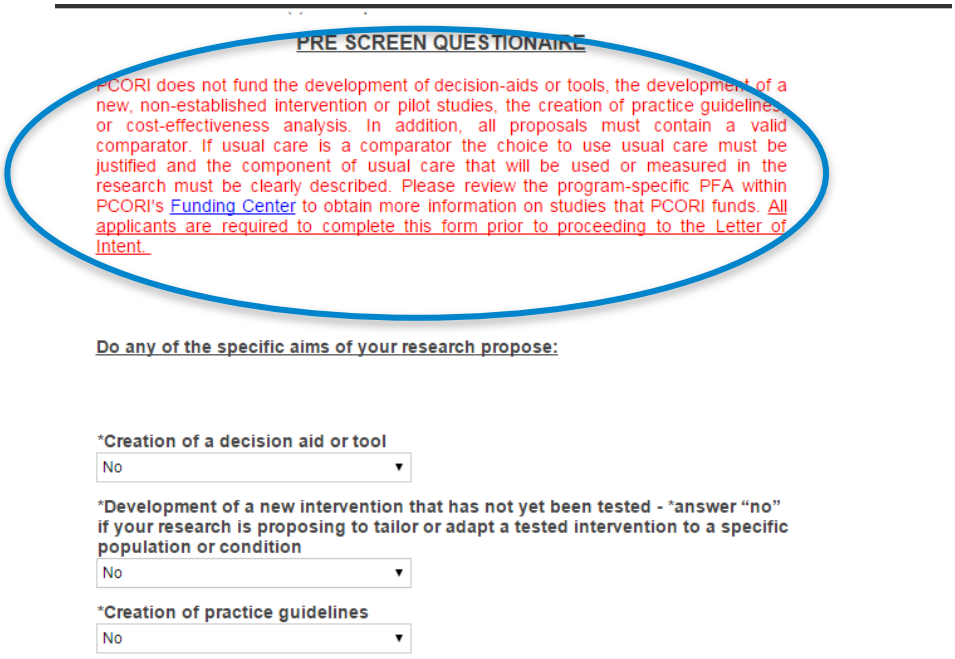
To return to a saved draft application, click on the yellow pencil icon on the landing page.


Amount Requested
Date Created
Program
Status
R-1501-26667
$1,100,000.00
Addressing Disparities
Application: In Progress Withdraw
Click on the yellow pencil icon to return to your
Status of the application is "In Progress" until all required fields are completed and the application is submitted to the Administrative Official.

Pre Screen Questionnaire

Please review the responses you provided in your LOI. **All questions with asterisks are required**.

This disclaimer will appear regardless of the answers you provide.


PRE SCREEN QUESTIONAIRE

PCORI does not fund the development of decision-aids or tools, the development of a new, non-established intervention or pilot studies, the creation of practice guidelines, or cost-effectiveness analysis. In addition, all proposals must contain a valid comparator. If usual care is a comparator the choice to use usual care must be justified and the component of usual care that will be used or measured in the research must be clearly described. Please review the program-specific PFA within PCORI's Funding Center to obtain more information on studies that PCORI funds. All applicants are required to complete this form prior to proceeding to the Letter of Intent.

Do any of the specific aims of your research propose:

*Creation of a decision aid or tool
No

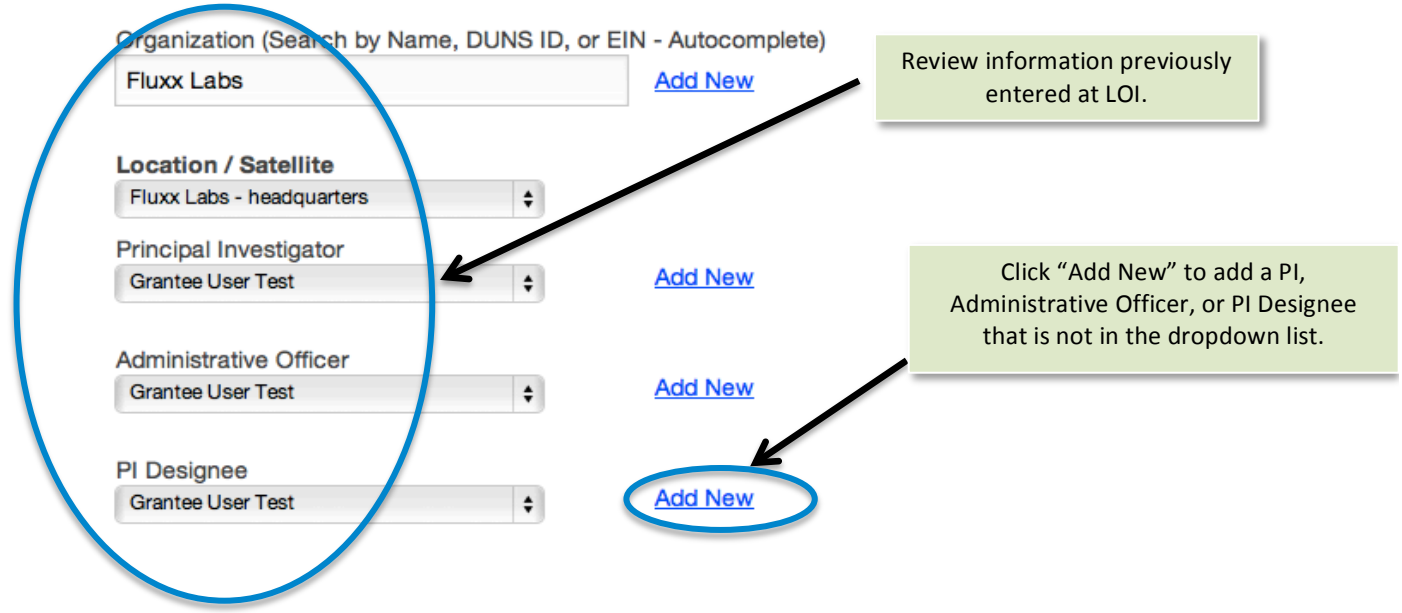
*Development of a new intervention that has not yet been tested - *answer "no" if your research is proposing to tailor or adapt a tested intervention to a specific population or condition
No

*Creation of practice guidelines
No

Principal Investigator and Contact Information

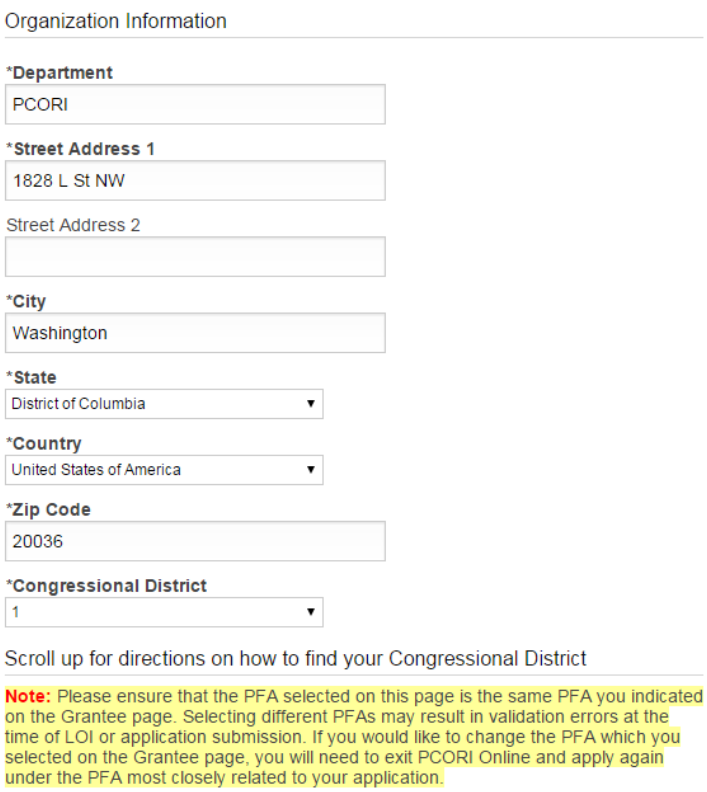
Review the information that was entered with your LOI submission. You may edit the information, if needed.

Note that Organization, Principal Investigator (PI), and Administrative Officer (AO) information are required for application submission. The PI and the AO cannot be the same person.


Organization (Search by Name, DUNS ID, or EIN - Autocomplete)
Fluxx Labs
Add New
Location / Satellite
Fluxx Labs - headquarters
Principal Investigator
Grantee User Test
Add New
Administrative Officer
Grantee User Test
Add New
PI Designee
Grantee User Test
Add New
Review information previously entered at LOI.
Click "Add New" to add a PI, Administrative Officer, or PI Designee that is not in the dropdown list.

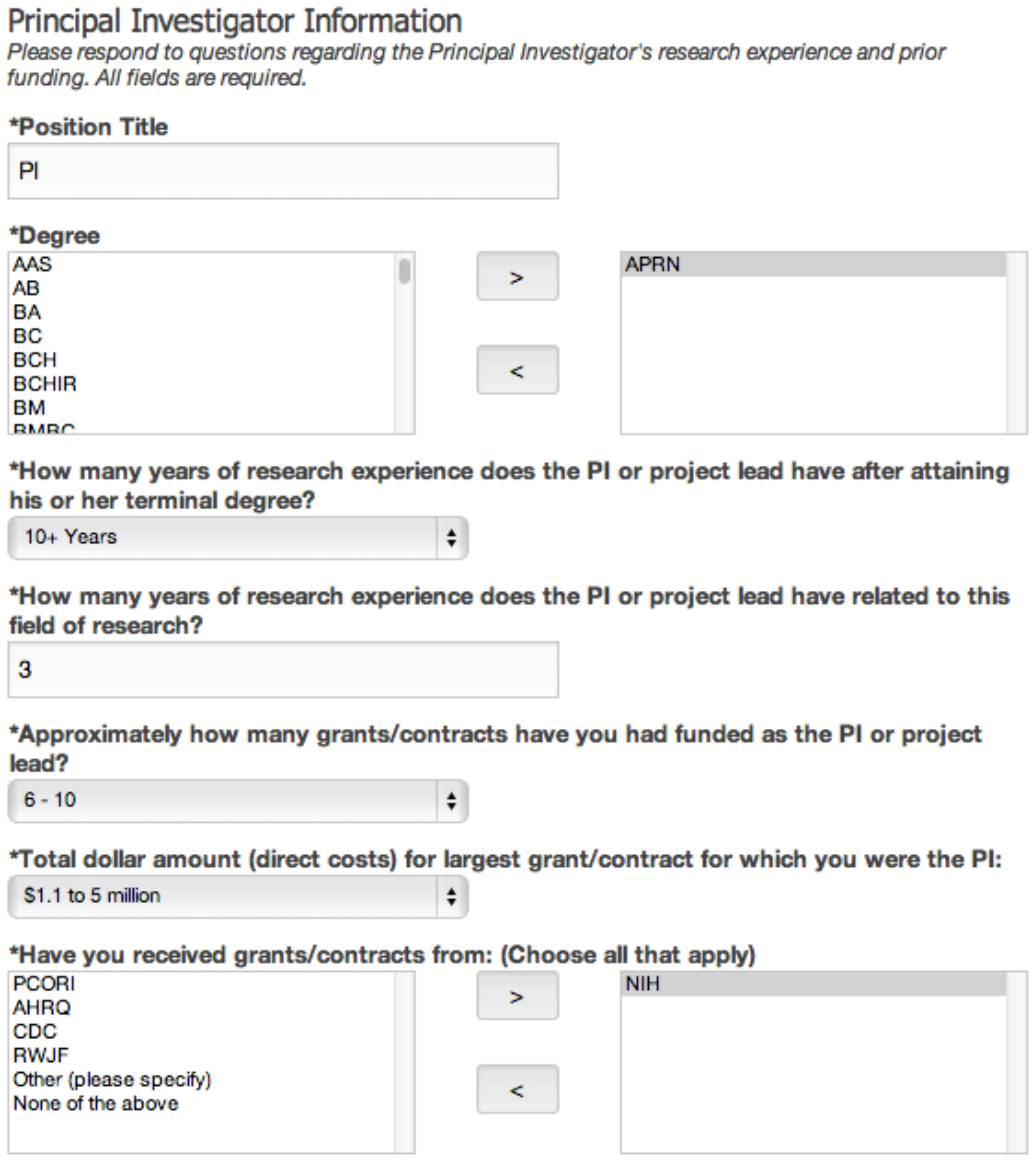
Organization Information

Review the organization information that was entered with your LOI submission. You may edit the information, if needed.


Organization Information
*Department
PCORI
*Street Address 1
1828 L St NW
Street Address 2
*City
Washington
*State
District of Columbia
*Country
United States of America
*Zip Code
20036
*Congressional District
1
Scroll up for directions on how to find your Congressional District
Note: Please ensure that the PFA selected on this page is the same PFA you indicated on the Grantee page. Selecting different PFAs may result in validation errors at the time of LOI or application submission. If you would like to change the PFA which you selected on the Grantee page, you will need to exit PCORI Online and apply again under the PFA most closely related to your application.

Review Additional PI Information

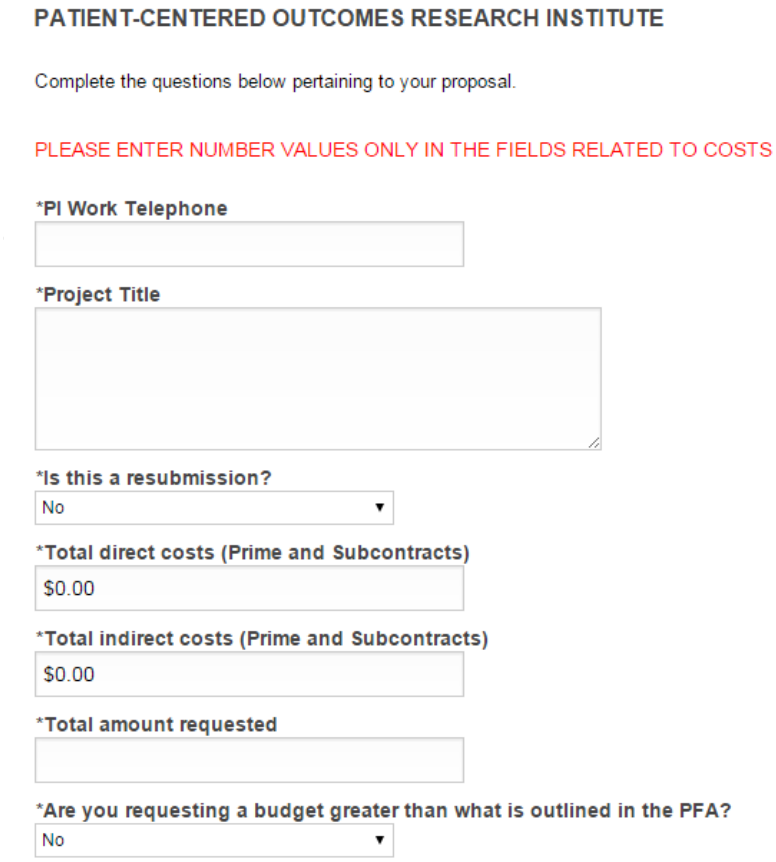
Review the PI information that was entered with your LOI submission. You may edit the information, if needed.


Principal Investigator Information
Please respond to questions regarding the Principal Investigator's research experience and prior funding. All fields are required.
*Position Title
PI
*Degree
AAS
AB
BA
BC
BCH
BCHIR
BM
>
<
APRN
*How many years of research experience does the PI or project lead have after attaining his or her terminal degree?
10+ Years
*How many years of research experience does the PI or project lead have related to this field of research?
3
*Approximately how many grants/contracts have you had funded as the PI or project lead?
6 - 10
*Total dollar amount (direct costs) for largest grant/contract for which you were the PI:
$1.1 to 5 million
*Have you received grants/contracts from: (Choose all that apply)
PCORI
AHRQ
CDC
RWJF
Other (please specify)
None of the above
>
<
NIH

Project Information

Enter the projected start and end dates of the project by clicking on the calendar icon.
Enter additional project information questions. Refer to the PFA and the Application Guidelines, found in the PCORI Funding Center, for additional guidance.

All fields are required.


PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

Complete the questions below pertaining to your proposal.

PLEASE ENTER NUMBER VALUES ONLY IN THE FIELDS RELATED TO COSTS

*PI Work Telephone

*Project Title

*Is this a resubmission?
No

*Total direct costs (Prime and Subcontracts)
$0.00

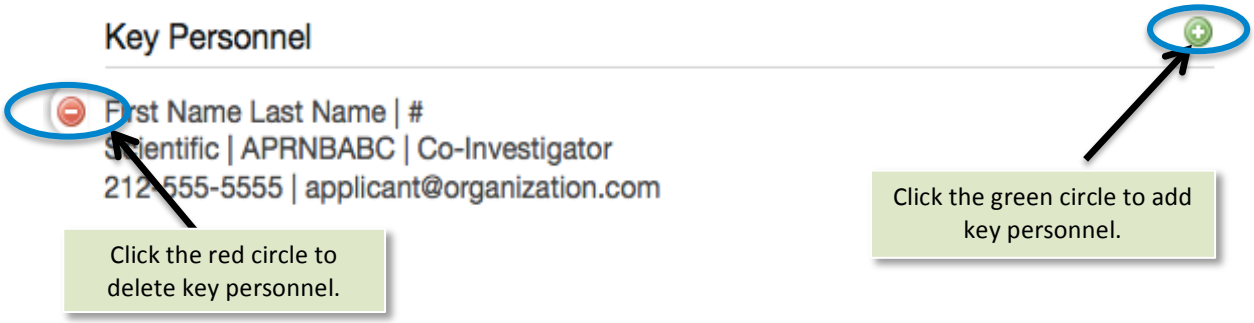
*Total indirect costs (Prime and Subcontracts)
$0.00

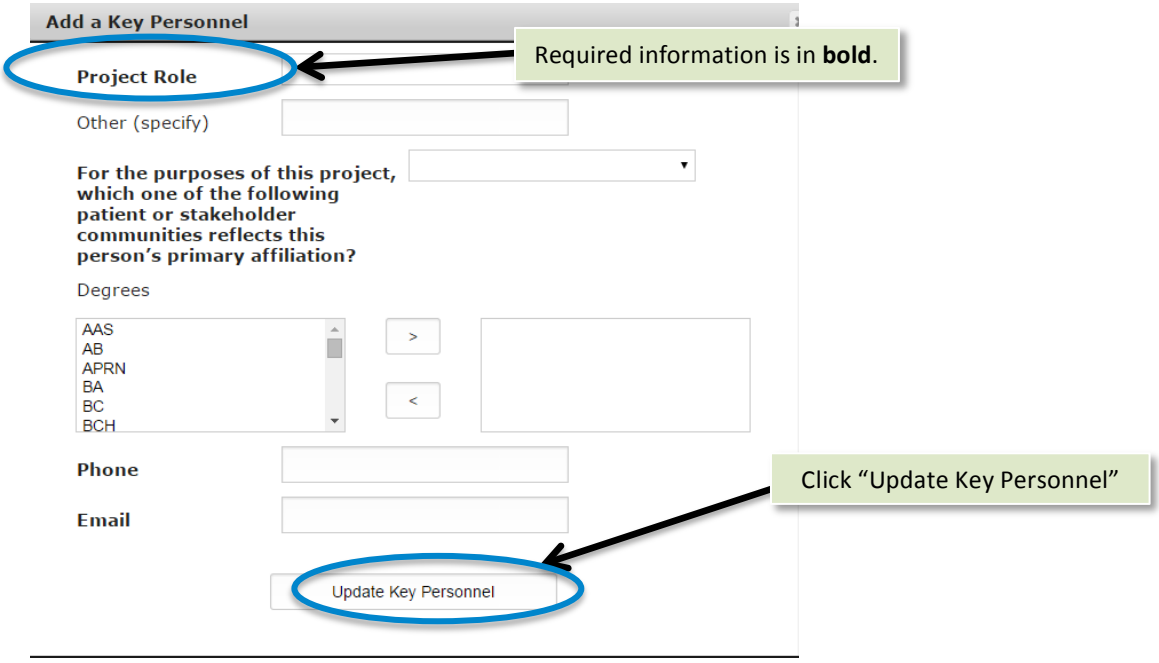
*Total amount requested

*Are you requesting a budget greater than what is outlined in the PFA?
No

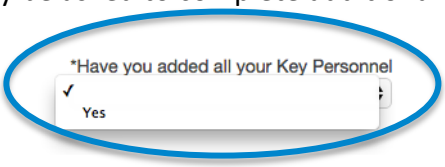
Key Personnel

- To add key personnel: click on the plus sign, enter key personnel information, and click "Update Key Personnel."
- To remove key personnel: click on the minus sign that appears when you scroll the cursor over a name.
- **Note: After you click "Update Key Personnel" you cannot go back to edit any information. If there is an error, you must remove the entry and create a new one.**


Key Personnel
First Name Last Name | #
Scientific | APRNBABC | Co-Investigator
212-555-5555 | applicant@organization.com
Click the red circle to delete key personnel.
Click the green circle to add key personnel.



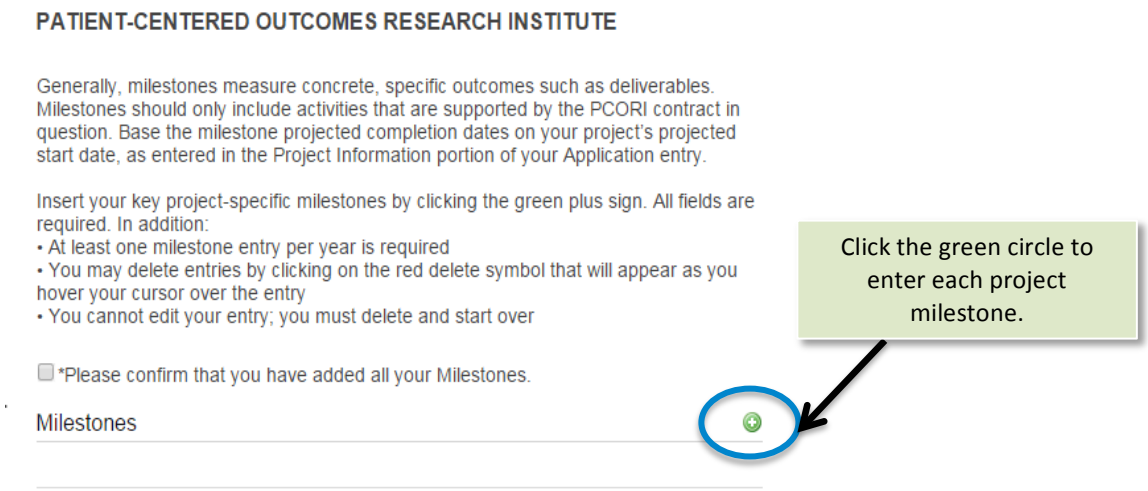
Confirm that you have added all Key Personnel by selecting Yes in the drop down menu. You may be asked to complete additional key personnel question(s).

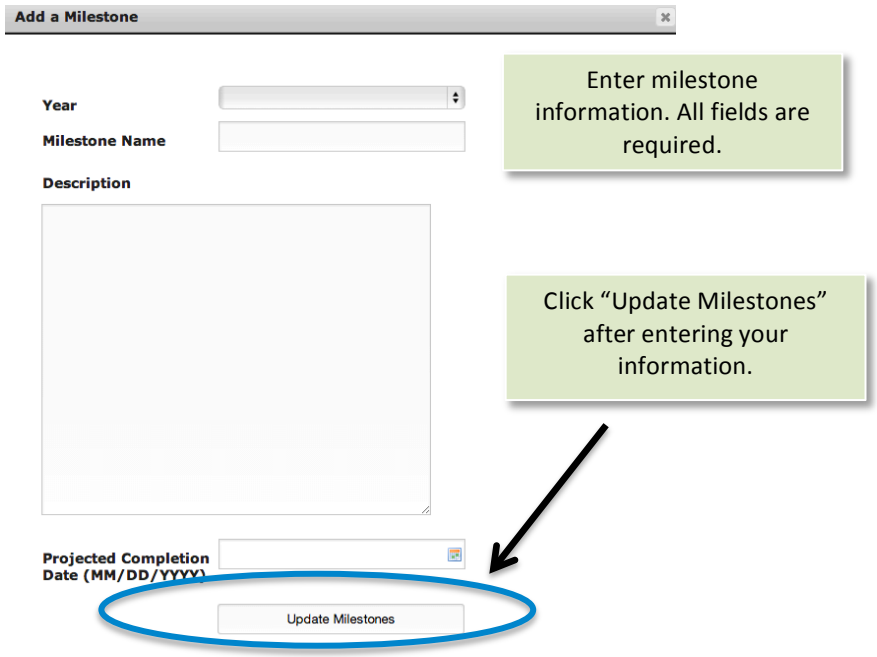


Milestones

Enter project milestones by clicking on the plus sign in the bottom right corner. Generally, milestones measure concrete, specific outcomes such as deliverables.

Enter milestone information, including: milestone name, description, and projected completion date. You can delete milestones by clicking on the minus sign in the top right corner, which will appear as you scroll the cursor over the entry. **You cannot edit your entry; you must delete and start over.**

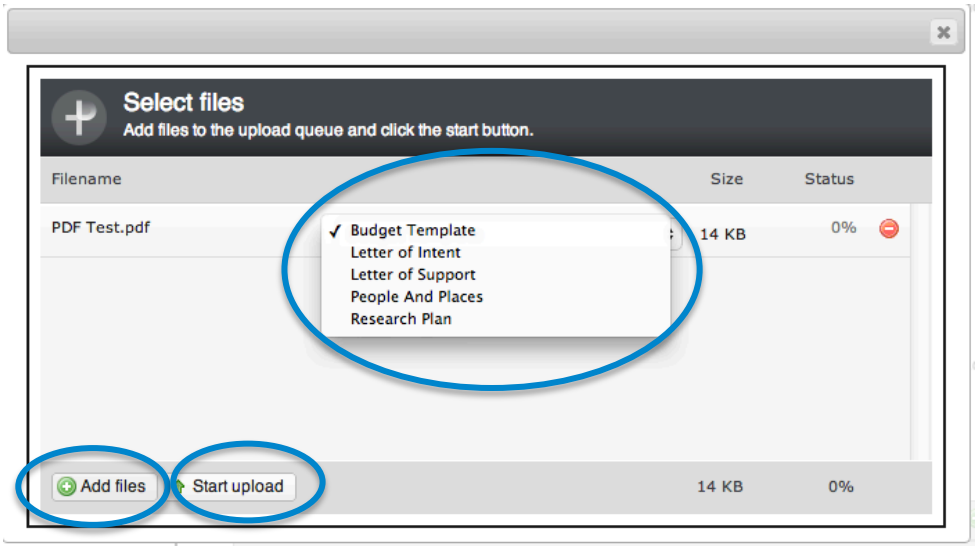

PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE
Generally, milestones measure concrete, specific outcomes such as deliverables. Milestones should only include activities that are supported by the PCORI contract in question. Base the milestone projected completion dates on your project's projected start date, as entered in the Project Information portion of your Application entry.
Insert your key project-specific milestones by clicking the green plus sign. All fields are required. In addition:
• At least one milestone entry per year is required
• You may delete entries by clicking on the red delete symbol that will appear as you hover your cursor over the entry
• You cannot edit your entry; you must delete and start over
*Please confirm that you have added all your Milestones.
Milestones
Click the green circle to enter each project milestone.

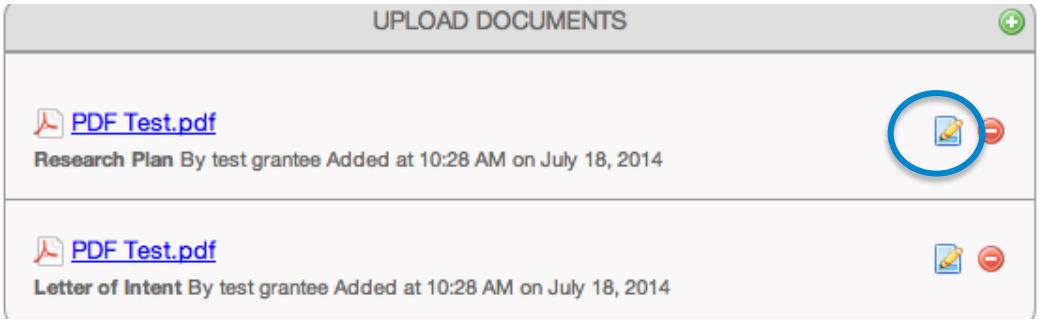


Templates and Uploads

All PFAs require additional documents to complete the application. For specific instructions, refer to the PCORI Application Guidelines found in the PCORI Funding Center for the relevant PFA type. **Note: all uploads must be PDFs.**

- To upload a document, click on the plus sign. Note: All uploaded files must be in PDF format.
- Click "Add files" and choose the file from your computer.
- Select the name of the required document that you are uploading from the dropdown list. If you select the wrong document name and continue with the upload, you can make a correction by clicking the pen and paper icon after the upload is completed. See the second screenshot below.
- Click "Start upload."
- To delete an uploaded file, click on the minus sign.




UPLOAD DOCUMENTS
PDF Test.pdf
Research Plan By test grantee Added at 10:28 AM on July 18, 2014
PDF Test.pdf
Letter of Intent By test grantee Added at 10:28 AM on July 18, 2014

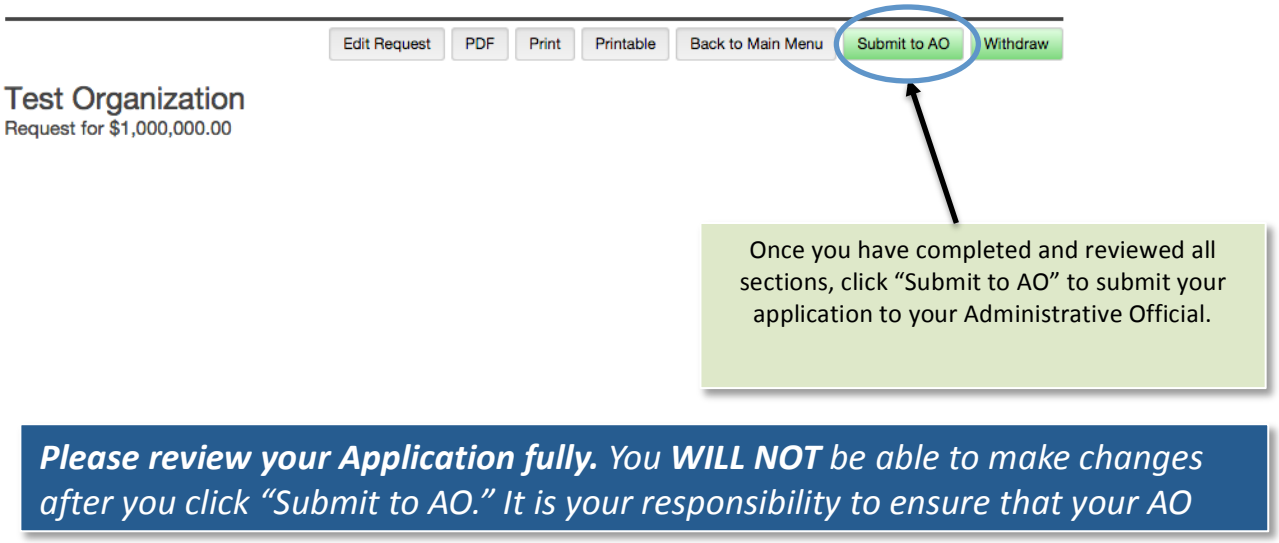
Save and Review

- You may save at any time by navigating to the bottom of the application and selecting Save and Review.

Submit to AO

Review the summary of your application. Click “Edit Request” if changes are necessary. Once complete, click the “Submit to AO” button to submit your application to the AO designated on the “PI and Project Information” tab.

Note that only the AO may submit the application to PCORI. Please contact your AO to ensure that your application was reviewed and submitted.



Please review your Application fully. *You* ***WILL NOT*** *be able to make changes after you click “Submit to AO.” It is your responsibility to ensure that your AO*

If changes to the application are required, the AO can release the application back to the PI. In order to do so, the AO must click the “Send Back to PI” button. The AO will need to notify the PI that an action is required on their part.

Once the AO has reviewed the application, they **must** click “Submit” in order to submit the application to PCORI.

Resources and Contact Information

- All active opportunities can be found in the PCORI Funding Center.
- To find application templates and any additional instructions for a specific opportunity, select the opportunity of interest in the Funding Center and review the applicant resources section of the page.
- PCORI's Applicant FAQs cover common questions that an applicant may have about PCORI and the application process. These are updated on a regular basis to reflect questions received through our helpdesk and applicant town halls.
- Applicant training materials and information about PCORI's applicant town hall sessions will be posted on PCORI's Applicant Training page. Once available, applicants will receive an email about these opportunities.
- If you have questions, please contact us at pfa@pcori.org.